Center for Earned Value Management

wInsight – "How to Use" Guide

Last Updated: Aug 2007

1. Mapping wInsight to a Database on the Hard Drive

wInsight uses a pre-formatted MS Access database and therefore, the wInsight database must be mapped to an existing database before using for the first time. The following are instructions for mapping databases located on a hard drive. (Note: This step is only done once, unless the database is renamed or moved)

Perform the following steps to map a database to wInsight on your local hard drive (C:\)

1. Copy the existing blank61.mdb database and rename for your use. (DO NOT CUT OR DELETE THIS EXISTING DATABASE AS IT IS NEEDED TO CREATE ADDITIONAL DATABASES IN THE FUTURE)
   a. Copy blank61.mdb from the following location: C:\Program Files\CSSI6\Data\Access
   b. Paste blank61.mdb to the following location: C:\Program Files\CSSI6\Data
   c. Rename blank61.mdb to something more descriptive
   d. Close all folders
2. Map wInsight to the new database created above
   a. Open wInsight 6.1 Administrator
   b. Click FILE
   c. Click SELECT DATABASE
   d. Choose ADD from the Select Data Source pop up box
   e. Name the New Data Source to match the name of the database to eliminate confusion
   f. Choose Microsoft Jet 4.0 OLE DB Provider
   g. Click Next to go to the CONNECTION time
      i. Box 1 - Select Database name by browsing and pointing to the database created in step 1 above.
      ii. Box 2 - REMOVE the word “Admin”
      iii. Click OK
3. Repeat steps 1 and 2 above to create additional databases on your local hard drive if needed.

Note:

- When the “Database Login Box” appears, leave both the “Name” and “Password” blank,
- When the “Application Login Box” appears, leave both the “User Name” and “Password” blank.

2. Tips for Getting Around in wInsight (Administrator 6.1)

1. To move from one database to another choose File, Database, and choose from the drop-down menu.

2. The name of the currently selected database is displayed in the upper left corner under the toolbar.

3. Under the database name are three selections…Data Input, Reports, Dataset.

4. Care should be taken when under the Data Input selection as changes made here are Permanent.

5. To view the contracts contained in the database expand Dataset, double-click Contracts and then expand Contracts. Expand the individual contract names to view the periods where data has been loaded.

6. To view the CPR formats, double-click a month, then expand Reports, and double-click a format

7. For ease of changing between contracts and periods go to Options, Toolbars, and be sure that Dataset is highlighted.

3. Updating the Local Database (C:\ drive)

When you receive data from the contractor each month, the first step is to update the local database.

1. Open wInsight Administrator 6.1
2. File – Select Database – Choose your local database from the drop-down menu, OK, OK (no name or password)
3. Load the files submitted by the contractor
   - a. IMPORT .TRN or .XML files:
     - i. Utilities, Import, Browse [to: the location of the file submitted from the contractor], OPEN
     - ii. OPTIONS - **Make sure all are checked EXCEPT “User (Security) Data”**, OK, OK
       1. If there are errors or warnings that will affect your data or that you don’t understand – CANCEL, CLOSE and Call the wInsight POC.
       2. If no errors, OPTIONS, **Make sure all are checked EXCEPT “User (Security) Data”**, OK, OK
       3. If “Import Succeeded”, CLOSE
       4. If “Import Failed”, Call the wInsight POC.
       5. Repeat this process for each contract
       6. Utilities, Recalculate, (hold down “Control” key and select all contracts Imported), highlight “All Periods”, OPTIONS, check ONLY “calculate element hierarchy”, OK, OK, CLOSE when “done”.
   - b. RESTORE .WSA files:
     - i. Utilities, Restore, Browse [to: the location of the file submitted from the contractor], OPEN
     - ii. OK
     - iii. OPTIONS, uncheck User (Security) Data, OK
     - iv. OK
     - v. When Import “Succeeded”, CLOSE
     - vi. Repeat this process for each contract
     - vii. There is no need to Recalculate when Restoring a .WSA file
4. Check the data for errors and fix any errors BEFORE backing up and updating the Server Database.

4. How To Backup Data on the Local Database (C:\ drive)

It is recommended that a backup is created of the monthly data received on the local database (Create a .WSA file).

1. Open wInsight Administrator 6.1

2. File, Select Database, Choose the local database from the drop-down menu, OK, OK (no name or password)

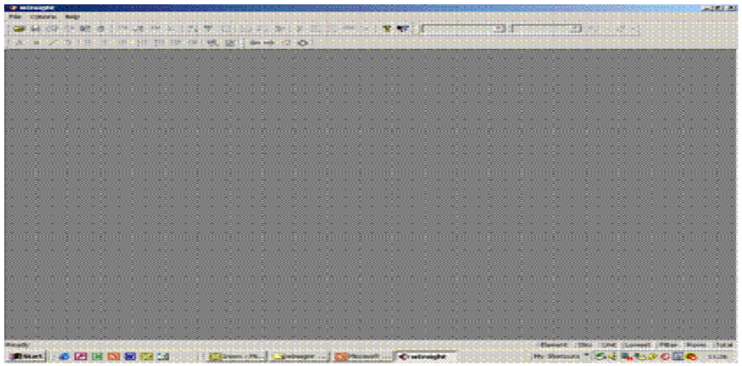
3. Utilities, Backup
   a. Select the contract(s) to backup
   b. Click Browse
   c. Choose a location and name for the file
   d. Save as type .WSA (default)
   e. Click OK
   f. When “Done”, click Close

5. Accessing the Data Using wInsight 6.1

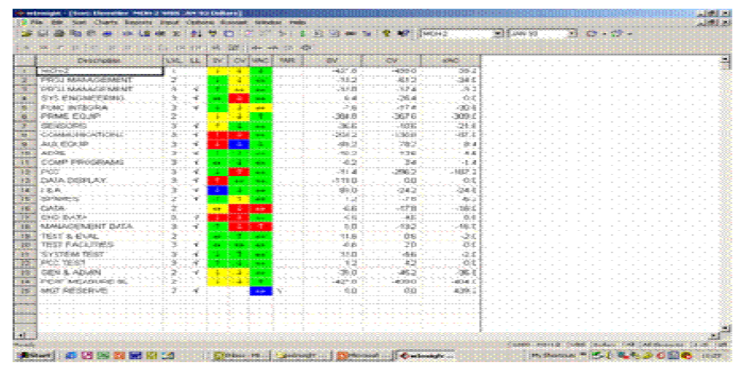
1. Open wInsight 6.1

   (NOTE: The following process is shortened if you do a "Save Workspace" after following these steps the first time – see page 12)

2. File – Select Database – Select your Local Database from the drop-down menu – OK



Your screen should look similar to the snapshot on the left (no data set open). If you have a data set open, you will not have the option under File to Select Database.

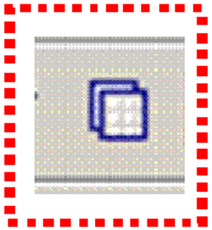


If your screen looks similar to the snapshot on the right, then you have a data set open. Click File – Close to close out of the data set.

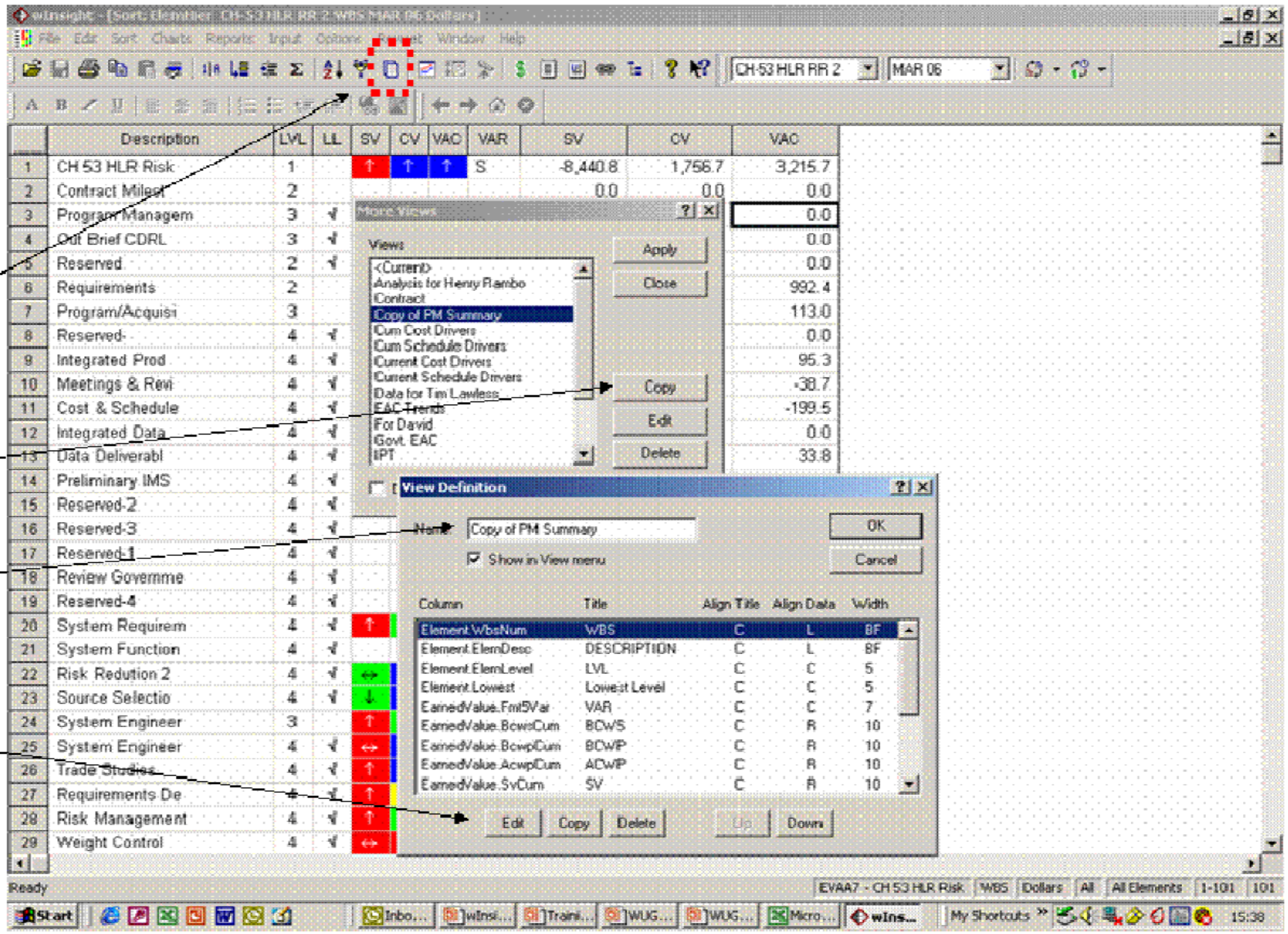
3. Database Login: Leave both Name and Password blank - OK
4. File – Open
5. Application Login:
   a. User Name leave blank
   b. Password leave blank – OK
6. Double-click the contract name
7. Highlight the desired period – OK
8. You will want to add the "Data Set" Toolbar to quickly move between contracts and periods. If provided by the contractor, you can toggle between WBS & OBS and Dollars & Hours. Click Options – Toolbars – check Dataset.

6. Creating a Custom View

"Views" icon



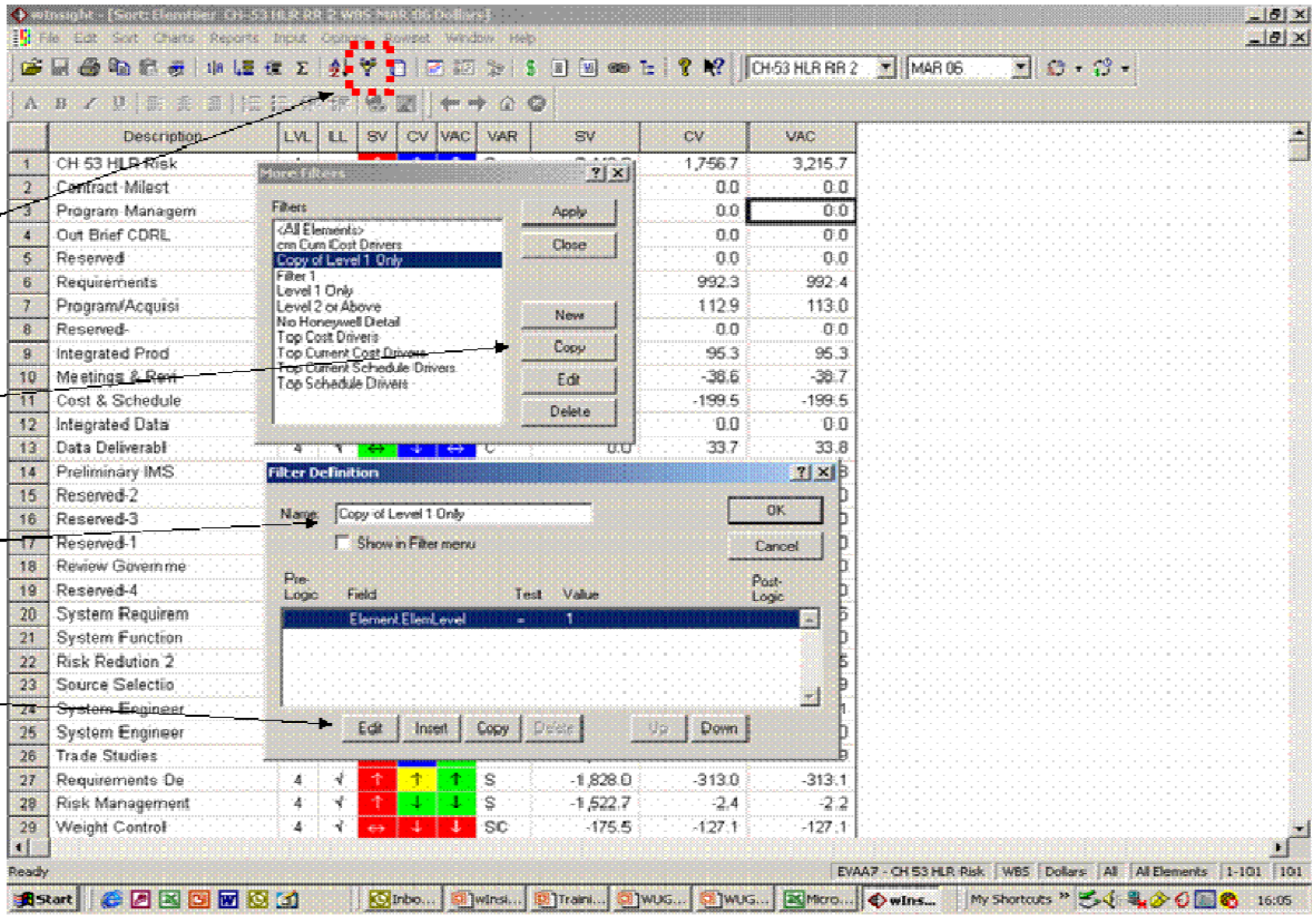
- Click the "Views" icon
- Select a similar view and click Copy
- Re-name the new view
- Add, delete or move fields



7. Creating Custom Filters

"Filter" icon

- Click the "Filter" icon
- Select a similar filter and click Copy
- Re-name the new filter
- Edit, add, delete or move fields



8. Tips for Creating Filters

When creating a filter, try using the question mark “?” as a “wild card” to match any character.

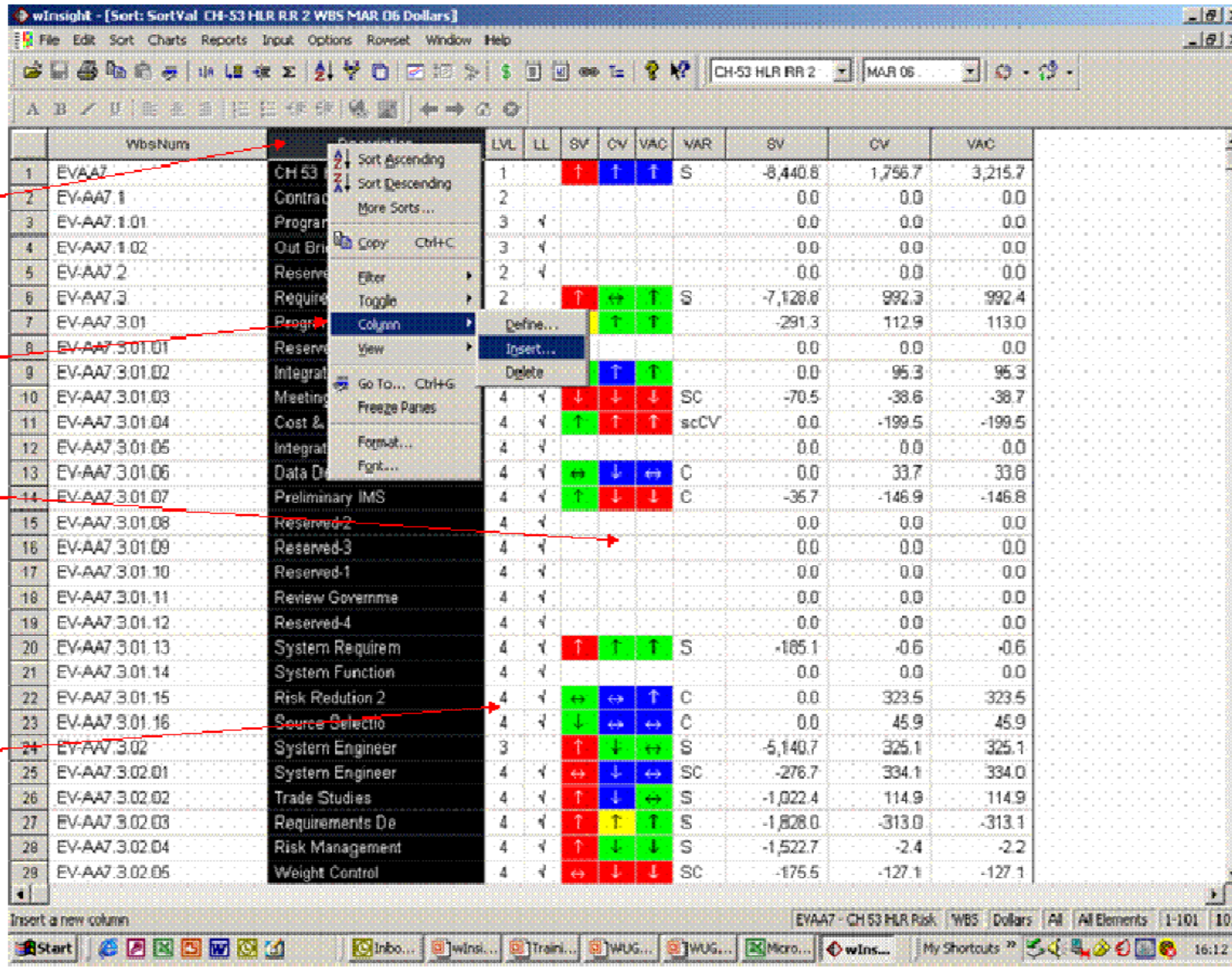
Filter Tests

The Test drop list of the Filter Item Definition dialog box provides a list of tests which can be
used to determine if a match exists between an element field and a specified Filter Value. The complete list of available tests is shown in the following table.

Test	**Description**
=	The field equals the value
<>	The field does not equal the value
<	The field is less than the value
<=	The field is less than or equal to the value
>	The field is greater than the value
>=	The field is greater than or equal to the value
In	The field is one of a set of values (a, b, c)
Not In	The field is not in one of a set of values (a, b, c)
Like	The field matches a wildcard value
Not Like	The field does not match a wildcard value
Is	The field is null (empty, it contains no data)
Is Not	The field is not null (not empty, it contains data)

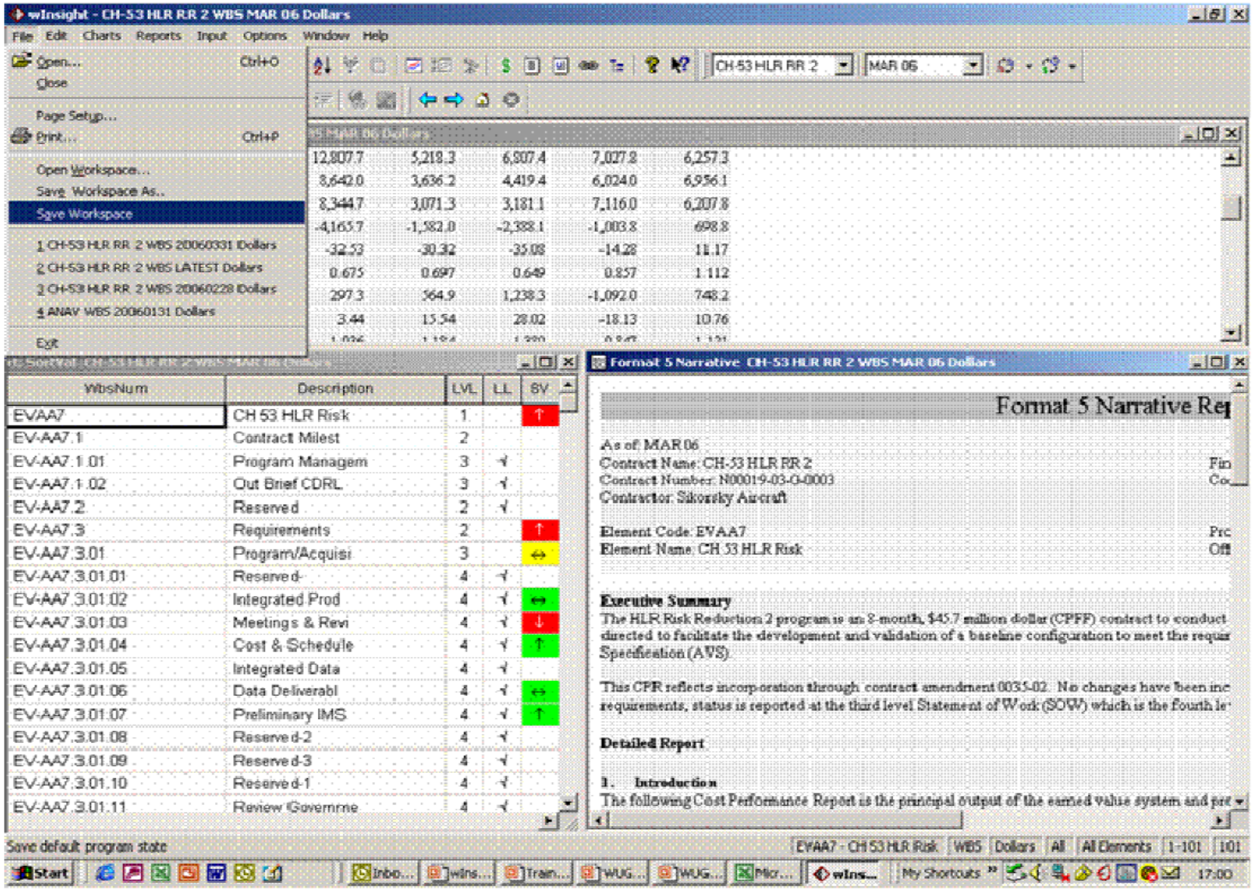
9. Inserting a Temporary Column into a Current View

- Highlight the column to the right of where you want to insert a new column.
- Right click, choose Column – Insert
- Select the field to insert
- You may change the title of the field, the alignment and width of the column
- To permanently insert the column to the view, you must edit the view itself

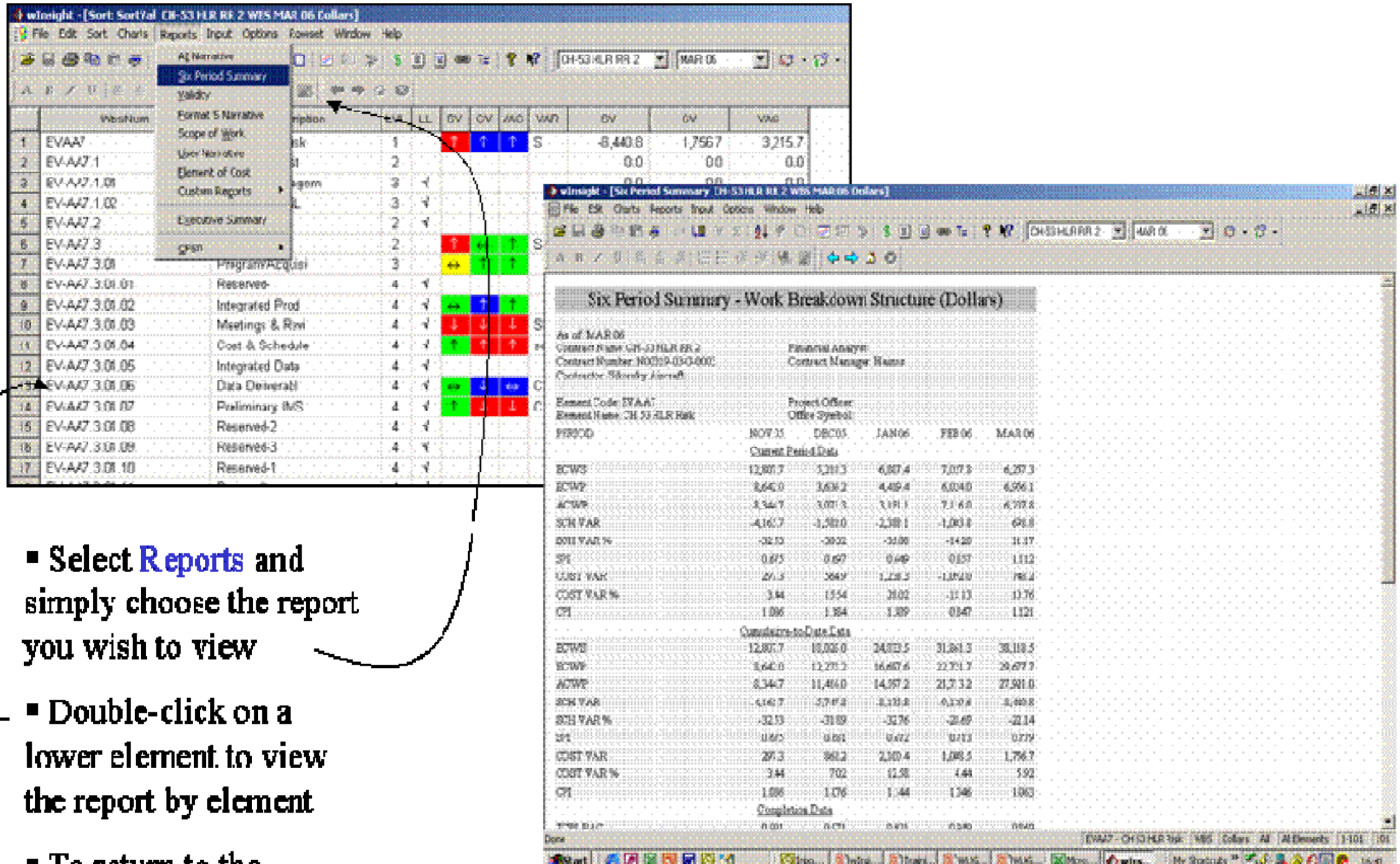


10. Saving a Workspace

- Open any views and reports and customize the size and location using your mouse
- Choose File – Save Workspace
- The next time you open wInsight this will be your default view
- Change the contract or the period and the windows automatically update
- Choose File - Save Workspace As and save a workspace to a local folder for future use



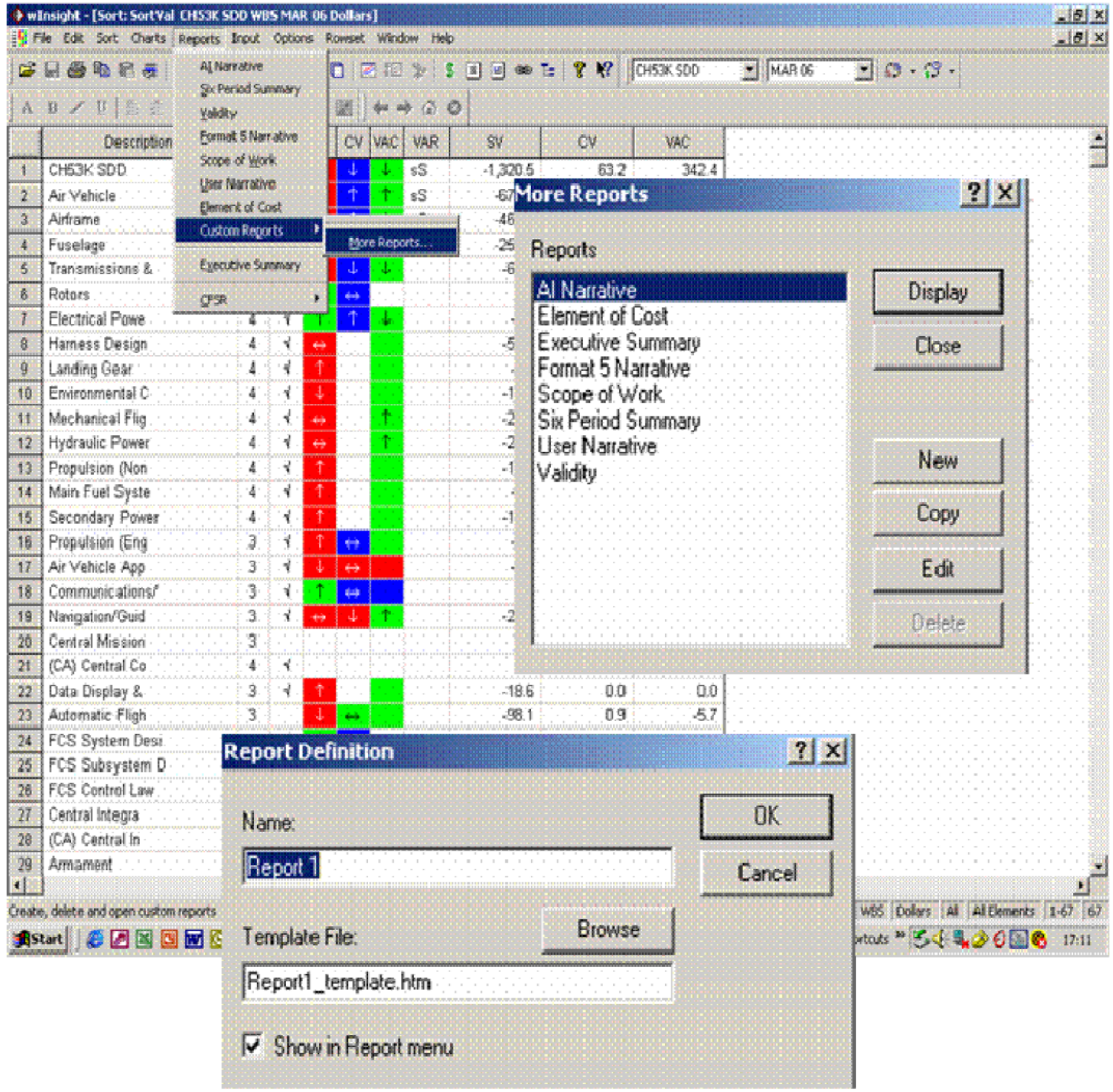
11. Viewing wInsight's Existing Reporting Options



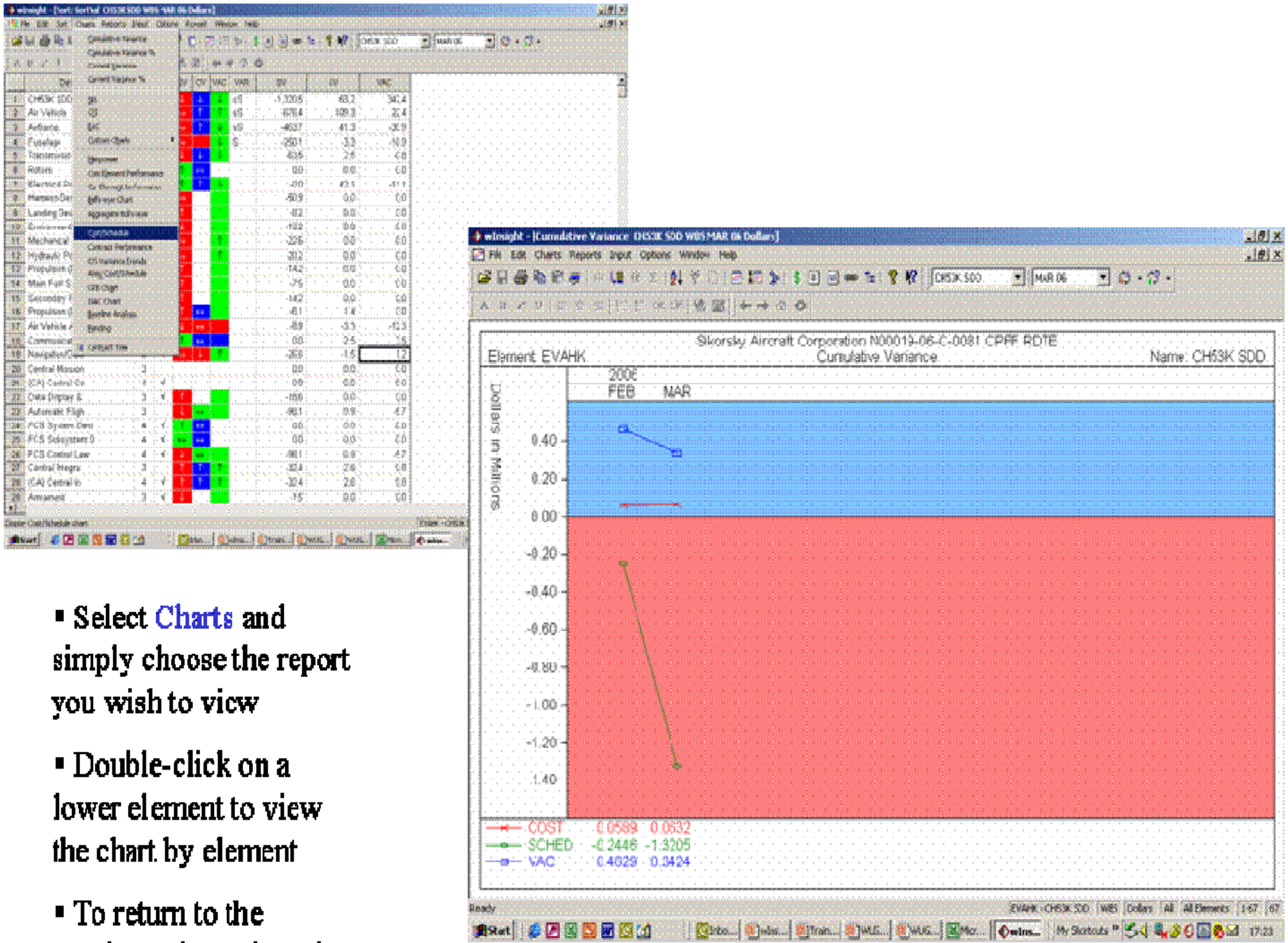
- Select **Reports** and simply choose the report you wish to view
- Double-click on a lower element to view the report by element
- To return to the previous view, close the report

12. Creating Custom Reports

- Choose Reports - Custom Reports – More Reports
- Select New to generate the report path
- Provide a report Name and Template file for the report.
- Template files are created using an HTML editor, using the Database field names to generate a report format & query the database for data.



13. Viewing wInsight’s Existing Charts



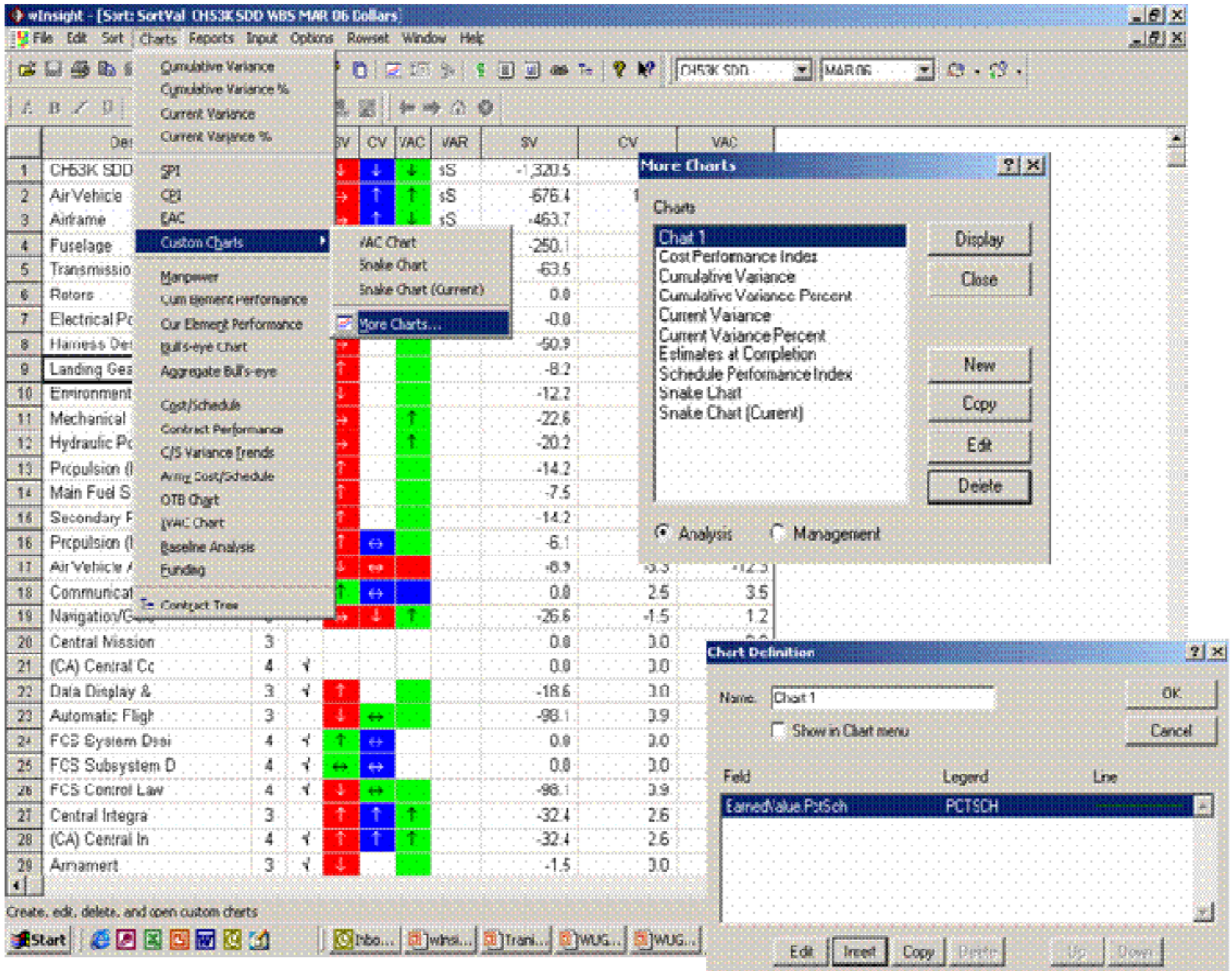
- Select Charts and simply choose the report you wish to view
- Double-click on a lower element to view the chart by element
- To return to the previous view, close the

14. Creating Custom Charts

- Choose Charts
- Custom Charts
– More Charts

- Select New to generate the chart

- Provide a report Name and Edit the chart as necessary.



15. Sharing Custom Views/Filters

- Exit out of data set
  - Choose Window – Close All
- Select File – Export Custom Items
- Save the file WSCUSTOM.XML to any folder
- Send this file to the receiving computer
- On the receiving computer, be sure all data sets are closed and Select File – Import Custom Items
- Open the WSCUSTOM.XML file
- Select how you want the charts, filters, and views in the WSCUSTOM.XML file to be merged with your exiting ones and click the OK button